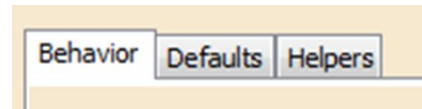




# Circulation Properties in WorkFlows

## Property Basics:

- ◆ This is all computer specific.
- ◆ Make sure the wizard you are working in is closed or the changes will not be reflected properly.
- ◆ Right click on the wizard name to pull up the properties.
- ◆ Change from wizard startup to never.
- ◆ Be aware of the tabs and button within the properties boxes.



•If you change it on startup, it only applies for that session and the session settings reset each time.

## Checkout Properties - Helpers Tab

- ◆ The check boxes make a helper appear on the top of the wizard. Turn on the helpers that you use and turn off the ones you do not use to reduce clutter and/or confusion.
- ◆ Clicking on the helper names that look like buttons will bring up even more options to configure these so they work best for you and your library.
- ◆ Pressing F1 with the Helpers properties selection box open will give you in depth helper descriptions from SirsiDynix.

Checking this box will open the User Search helper every time you check out to a new patron. This allows libraries who always search by user name to avoid that extra click each time they start a new check out.

Allow	Configure Properties
<input checked="" type="checkbox"/>	User Search
<input checked="" type="checkbox"/>	Display User
<input checked="" type="checkbox"/>	User Lost Card
<input checked="" type="checkbox"/>	Register New User
<input type="checkbox"/>	Pay Bills
<input type="checkbox"/>	Add Brief Title
<input checked="" type="checkbox"/>	Item Search
<input checked="" type="checkbox"/>	Confirm Address
<input checked="" type="checkbox"/>	Change Item ID
<input checked="" type="checkbox"/>	Special Due Date
<input checked="" type="checkbox"/>	Alternate Circ Rule
<input checked="" type="checkbox"/>	Renew Privilege
<input type="checkbox"/>	Print User Card
<input checked="" type="checkbox"/>	Print User
<input type="checkbox"/>	Enable add photo
<input type="checkbox"/> Start with search helper	

## Checkout Properties - Behavior Tab

Change this to Never if you do not want to set different properties for each session.

Allows circulation staff to renew a patron's expired privileges during check out. If the check box is not selected, the staff cannot extend the patron's expired privileges, and the patron will be unable to check out.

Turn sounds on or off based on your preference. Keep in mind that a sound may create a delay if sounds are on but you have muted your speakers.

CheckOut : Set Properties

Display property page: ☐ Wizard Startup ☒ Never

Behavior Defaults Helpers

Configure

☐ Hide current user ☐ Hide current item

☒ Extend user's library privilege ☒ Pay bills

☐ Proxy checkout with cancel hold ☒ Checkout reserve desk items

☐ Automatically restart checkout on item ID error ☒ Display circulation note

☐ Cache Item ID's ☐ Display an alert for the next to last renewal

☐ Automatically renew items already checked out as seen

☐ Automatically renew items already checked out as unseen

☒ Do not automatically renew items already checked out

Checkout all items associated with a set ☒ Yes ☐ Prompt

User Alerts Display

☒ Display alert for delinquent user ☒ Display user alerts

☒ Display alert for previous loan

Sounds

☒ Play sound for User Delinquent alert

☒ Play sound for User Blocked alert

☒ Play sound for Hold alert

Charge printing

☐ None ☒ Print date due slips ☐ Print charge receipts

Email Checkout Receipt

☐ Display Email All Checkouts Receipt button

☐ Display Email Current Checkouts Receipt button

Template:

Prompt for email address if missing

☒ Do not prompt for an email address ☐ Prompt for an email address ☐ Prompt to open Modify User Helper

Allows a patron to pay bills when checking out items from the user alerts window.

If this property is selected, the **item** circulation note (if it exists) will display when item is used in a transaction in the wizard.

Change your printing options based on what works for you library and your equipment.

If you would like to give patrons the option of email receipts, you can try these options. However, at this time, it may still print a paper receipt even if you choose email. Great if you are ok with tossing the paper receipt or don't print receipts at all.

## Checkin Properties - Behavior Tab

NOTE - In the F1 Help, SirsiDynix calls this wizard "Discharge/Checkin". The MSC has chosen to use Checkin as the default name for this wizard.

If this property is selected, when a bill is created on discharge, the Pay Bills screen opens so you can take care of the patron's outstanding bills.

Displays a status alert window if the user's status has a delinquency type of DELINQUENT, BLOCKED, or BARRED.

This error means that the item was already checked in, or not checked out at all.

With this checked, a window will popup to tell you the item hasn't been checked out.

If you want to avoid the extra popup you can uncheck this and the error will still appear on the right hand side of the screen.

Displays a popup message with instructions for items that are to be routed for **special** reshelving, for example— Reserve Desk, and so on.

Displays a popup message for items that are routed to the **holds** shelf.

Checkin : Set Properties

Display property page: ☐ Wizard Startup ☒ Never

Behavior Defaults Helpers

Configure

☒ Hide current item ☐ Display user information

☒ Pay bills ☒ Display instructions

☐ Warning if user delinquent ☒ Display hold instructions

☒ Display "item not checked out" error in a separate window ☒ Display in transit instructions

☐ Display circulation note ☐ Check for claims returned items ☐ Claims returned alert: allow modify user prompt

☒ Display bill warning for every item ☐ Display user ID in list

Accumulate fines: ☐ Yes ☒ No ☐ Prompt

Sounds

☒ Play sound for Hold Available alert ☐ disrout.wav

☒ Play sound for Transit alert ☐ disrout.wav

☐ Play sound for Claims Returned alert ☐ disrout.wav

☒ Play sound for User Delinquent alert ☐ disrout.wav

☒ Play sound for Item not Charged alert ☐ disrout.wav

☒ Play sound for Item not in Catalog alert ☐ disrout.wav

Allow Configure Properties

☒ Print available hold slips

☐ Print transit slips

☐ Print transit slips if transit to is outside selected group

☐ Print reshelving slips

☐ Print hold wrapper slip

OK Cancel

Displays a message with instructions for items that are to be put into transit for shelving at **another library**.

Turn sounds on or off based on your preference. Keep in mind that a sound may create a delay if sounds are on but you have muted your speakers.

If this property is selected, when discharging multiple overdue items for the same user, it will display a warning message prompting the payment of a fine for each item.

### Checkin Helpers Tab:

- ◆ Similar to the CheckOut, these helpers can be turned on or off depending on your preferences.

## Renew User Properties

- ◆ This wizard can be thought of as the “Renew by User” wizard because it allows you to renew items by looking up the patron. This is not where you renew the patron’s expired library card.
- ◆ Right click on Renew User to set the properties for all future sessions. Remember, properties set to the workstation, so anything you change will be changed on that computer only.

The image shows two screenshots of the 'Renew User Properties' dialog box. The left screenshot shows the 'Behavior' tab with the following options:

- ☒ Warning if user delinquent
- ☒ Extend user's library privilege
- ☐ Review items before renewing
- ☒ Renew reserve desk items
- ☐ Override all failed items
- ☒ Display user alerts
- ☐ Display circulation note
- ☐ Display an alert for the next to last renewal

Under 'Charge printing':

- ☐ None
- ☒ Print date due slips

The right screenshot shows the 'Defaults' tab with the following options:

- ☒ User Search
- ☒ Display User
- ☒ User Lost Card
- ☒ Pay Bills
- ☒ Special Due Date
- ☒ Limit List by Due Date
- ☒ Renew Privilege

## Bill Notes

- ◆ A bill note is tied to a bill. For example, if a book was returned damaged, you could use this note to explain the damage so all staff that come in contact with this issue can see the note. When the bill is resolved (paid or waived), the note goes away.
- ◆ Bill notes have to be turned on in properties in three places to function properly:
  1. Bill User properties
  2. Pay Bill properties
  3. Display User properties

Right click on each of these wizards to turn on the bill note function. They are all in the Defaults tab.

The image shows the 'Bill User : Set Properties' dialog box, specifically the 'Defaults' tab. The 'Display properties' section has the following options:

- ☒ Show bill note
- ☐ Show bill tax
- ☐ Show bill total

Under 'Allow Configure Properties':

- Payment type: CASH

Under 'Automatic Payment Defaults':

- Credit reason: PAYMENT

## Modify User Properties

Behavior | Helpers

Edit Options

☒ Show Demographics Tab ☐ Show Accountability Tab

☒ Show Addresses Tab ☒ Show Extended Info Tab

Privilege Tab

☒ Show Privilege Tab

☐ Allow privilege renewal by profile

☐ Profile modified/auto extend privilege

☐ Show web auth ID ☐ Show BLUEcloud Staff ID

Outreach Tabs

☐ Show Outreach Tab

Interests: None Histories: None

Inactive IDs

☐ Move previous User ID to inactive IDs

At end of wizard

☒ Show checked buttons ☐ Perform selected action

Show

☒ Modify Another User

☒ Make More Changes

☒ Close

Perform

☐ Modify Another User

☒ Close

User information

Identify User

Card #:

Basic Info | Privilege | Demographics | Addresses | Extended Info

- ◆ Those three tabs contain important user information that you probably need access to at your library. They can be turned on in the behavior tab of the Modify User properties.

## New User Properties

- ◆ User Duplicate Searching will check the system to make sure you are not creating a second card for one user.
- ◆ In the New User properties under the Behavior tab, choose what parameters to check against, like birth date, name, or whatever makes sense for your library.
- ◆ This will either return results for all MSC libraries, for your Sharing Group, or for your own library only depending on how your library is set up.
- ◆ You can also turn off this feature if you are not using it.

User Registration : Set Properties

Display property page: ☐ Wizard Startup ☒ Never

Behavior | Defaults | Helpers

Configure

☐ Auto-generated User ID

Default user ID prefix:

☒ Show Addresses Tab ☒ Show Privilege Tab

☒ Show Extended Info Tab ☒ Show Demographics Tab

☒ Allow routing

User Duplicate Searching

Duplication checking: ☒ on ☐ off

☒ Birth Date ☐ COMMENT

☐ COMPANY ☐ DAYPHONE

☒ EMAIL ☐ Group ID

☐ HOMEPHONE ☐ LICENSE

☐ LOSTITEM ☒ Name

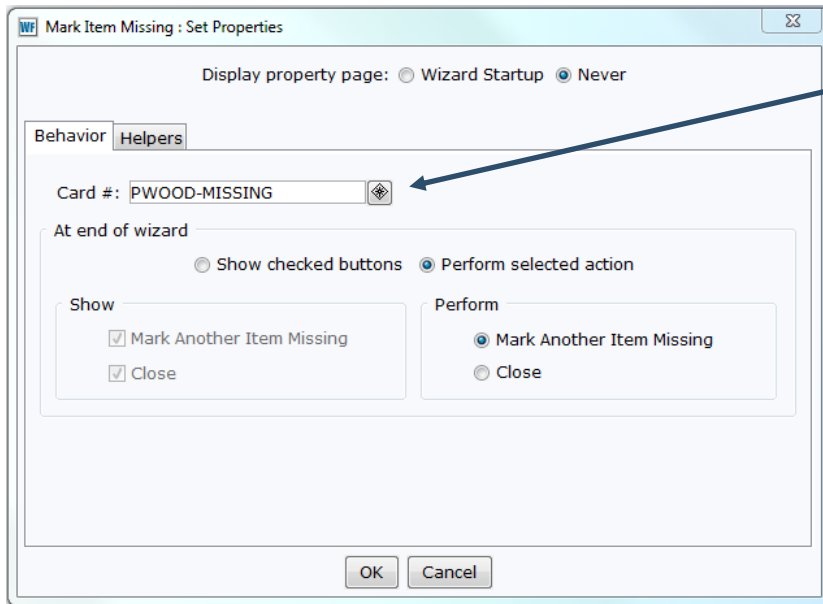
☐ PH-NOTICE ☐ PHONE

☐ SSN ☐ STREET

☐ STUDENT\_ID ☐ Web Authentication

☐ WORKPHONE

## Mark Item Missing Properties



The naming convention is your library policy name-MISSING

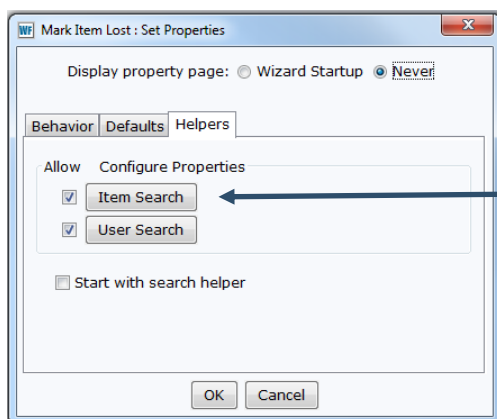
PWOOD-MISSING for example.

If this is not in here, tell us so we can set it up!

Use this when something is supposed to be on the shelf but isn't. Do not use it when someone has it checked out.

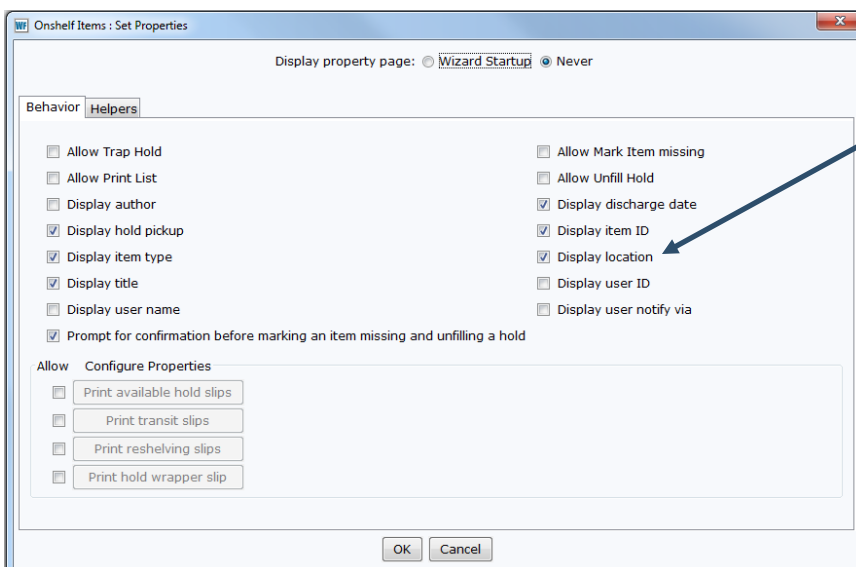
To use it, search for the item, and click Mark Item Missing on the bottom of the screen. If it turns up, just check it in to restore its former status. It is a good idea to send someone out to look for these items from time to time. If they do not turn up you can ask us to run a report to remove them from your catalog.

## Mark Item Lost Properties



- ◆ If a patron loses a book – this is how you clear it from their card and charge them for it.
- ◆ You might want to turn on the search helper in the properties because this wizard only has Item Id Scan and when an item is lost you don't usually have the barcode.

## OnShelf Items Properties



Notice the pick-up library. If you are in a partner Sharing group, or if there are multiple locations for patrons to pick up materials this will be important to you. Otherwise you might turn it off in properties.